Slide 1

Performance Management

Employee Appraiser Tutorial

Idaho Division of Human Resources 2006

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Slide 2

Employee Appraiser

- The following tutorial can be used for Employee Appraiser 4.0 and 5.0.

- Version 5.0 has the additional Development Coach, Job Coach, and Document Reminder functions

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Slide 3

Tutorial Format

- This tutorial program has been developed using the same format in which a typical performance appraisal is developed.

- Each screen will automatically advance however, you may use the mouse or space bar to advance at a faster pace.

- You may advance to a particular section by selecting the topic from the following Table of Contents.

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Slide 4

Table of Contents

- The Quick Start Menu
- The Employee Folder
- Creating a New Appraisal
- The Writing Assistant
- Development Coach
- Job Coach
- Additional Performance Standards
- Performance Summary
- Manager's Resource Center
- Spell Check & Language Scan

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Slide 5

The Quick Start Menu

The Quick Start dialogue box appears when you start the application.

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Slide 6

Access any part of the Employee Appraiser through the Quick Start menu

- Select "**New**" to start a new appraisal document.
- Select "**Open**" to open an existing document.
- Important employee Information is stored in the Employee Folder. Select "**Employee**".

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Slide 7

- To find suggestions to motivate employees and solve problems, select "**Development Coach**".
- The "**Job Coach**" provides ideas and solutions related to specific jobs and roles.

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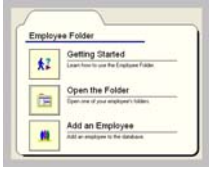_____

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Slide 8

- "**Resources**" opens the Manager's Resource Center and related tools, which can help you manage your people and resources more effectively.
- "**Help**" is an excellent resource to find assistance on managing the review process and assistance with specific functions.

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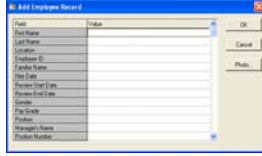
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Slide 9

The Employee Folder

- Before beginning a new appraisal, first enter critical employee information into the Employee Folder.
- Key information, such as name and title, will **automatically populate** the evaluation template.
- Begin by selecting "Add an Employee"

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Slide 10

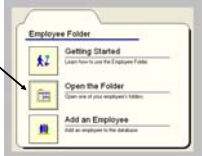**Adding Employees to the Folder**

- Enter information into the 'value' section.

- You may use 'tab' or 'enter' to move from one field to another.

- Use the "/" when entering in dates.

- Click "OK" to save.

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Slide 11

Opening Employee Folder

To open an employee folder, select "Open" from the menu.

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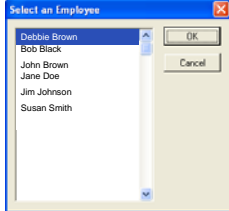
Slide 12

Selecting an Employee

Once the employee information is added, you can update or modify the information.

To select the desired employee, highlight the employee's name and click "OK".

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Slide 13
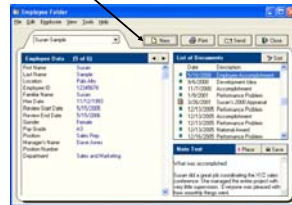

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Slide 15

Slide 16

Using Notes in the Employee Folder

- Enter notes regarding
  - Employee performance,
  - Objectives,
  - Accomplishments,
  - Coaching, and
  - Feedback
- Enter notes on a regular basis or when issues/accomplishments occur.
- This information can then be pasted into the actual appraisal, which provides a good review of the entire evaluation period with specific examples.
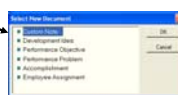

Slide 17

Entering Notes into the Folder

- To add a new note, select "**New**" from the upper tool bar.

Slide 18

Entering Notes into the Folder
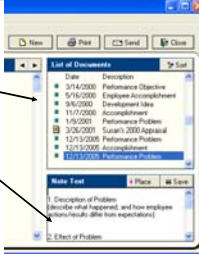
- Select the type of note you want to record.

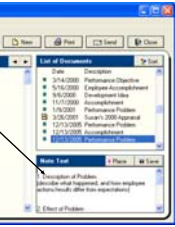- Select "OK"

Slide 19

Date and Description of Notes

- When a note is added, the date and description of the note is automatically added to the List of Documents.

- Enter information in the Note Text section.

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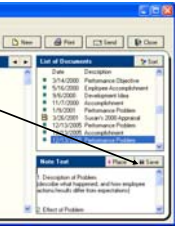
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Slide 20

Notes with Prompts

- Some note topics prompt you for information.

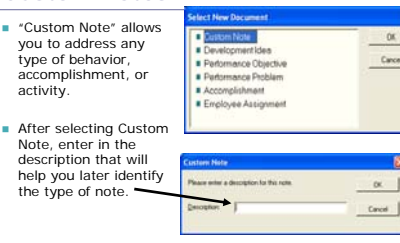- Entering the prompted information ensures proper documentation.

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Slide 21

Notes with Prompts

- After entering information, click on "Save".

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Slide 22
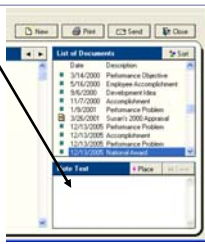
Custom Notes

- "Custom Note" allows you to address any type of behavior, accomplishment, or activity.

- After selecting Custom Note, enter in the description that will help you later identify the type of note.
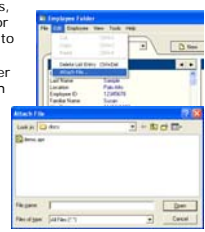
Slide 23

- Your cursor will move to the Note Text box.

- A Custom Note will not have prompts.

- After entering in the information, select "Save".

Slide 24

Attaching Documents

- You may also attach emails, letters of commendation, or even previous evaluations to your list of documents.
- Select "Edit" from the upper menu and highlight "Attach File".
- Select the drive or folder where the document is located, highlight the document, and click on Attach.

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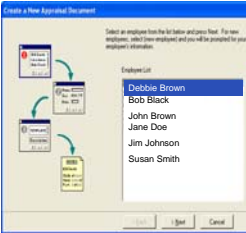**Creating a New Appraisal**

From the Quick Start menu, select "New".

Slide 26

Creating A New Appraisal

- If the employee has been entered into the Employee Folder, his/her name will appear on the list.

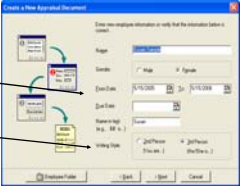- Select the employee you are evaluating.

- Click on "Next".

Slide 27

Verify Employee Information

- Verify that the employee information is correct, or make any necessary changes.

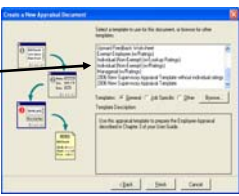- Determine Writing Style.

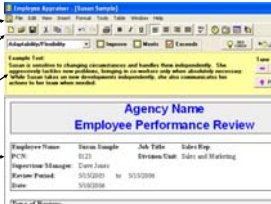- Select "Next".

Slide 28

Selecting an Appraisal Template

- Scroll through the list of available templates and select the appropriate template for your agency.

- Click "**Finish**" to open the template.

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Slide 29

Employee Appraiser Layout

- Command Line

- Tool Bar

- Writing Assistant

- Body of appraisal form.

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Slide 30

The Writing Assistant

- The Writing Assistant provides sample wording to address performance and performance standards.
- This is a tool and should always be supplemented with actual examples and dates.

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Slide 31

Using the Writing Assistant

- Select the Appraisal topic

Slide 32

Using the Writing Assistant
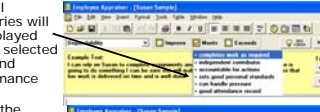
- Click on Improve, Meets or Exceeds; whichever one best describes the level of performance in that topic.

Slide 33

- Several categories will be displayed for the selected topic and performance level.
- Select the appropriate category.
- Sample text will then be displayed.

Slide 34

Changing Tone of Sample Text

- Using the "-" and "+" buttons, you have the ability to change the 'tone' of the text.
- "+" makes the text more positive.
- "-" makes the text less positive.
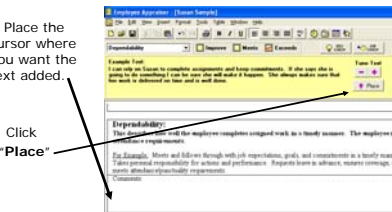
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Slide 35

Placing Sample Text into the Template

- Place the cursor where you want the text added.
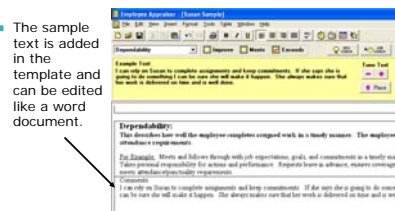
- Click "**Place**"

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Slide 36

Placing Sample Text into the Template

- The sample text is added in the template and can be edited like a word document.
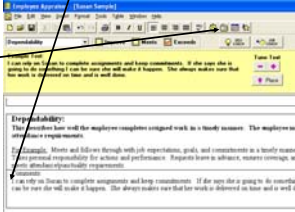
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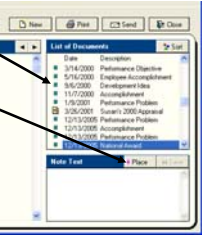
Slide 37

Placing "Notes" from Folder

- To add the notes kept in the Employee Folder, place your cursor where you want the text added.
- Click on the "Employee Folder" icon.

Slide 38

- Highlight the "Note" you wish to add into the appraisal text.
- Select "Place"
- The Note text is automatically placed in the appraisal.

Slide 39

Development Coach

- The Development Coach tool provides suggestions to help both you and the employee improve performance and solve problems.
- Place cursor where the suggestions should be placed.

Slide 40

Viewing Development Coach Suggestions
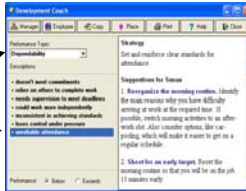
- Click on the "Dev Coach" icon.
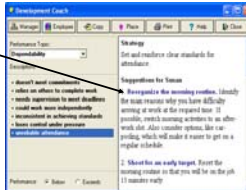
Slide 41

- If not automatically displayed, select the appropriate topic.
- Select the category.

Slide 42

Inserting "Suggestions"

- Suggestions for the employee are displayed.

Slide 43

Inserting "Suggestions"

- The entire list of suggestions can be added to the appraisal by selecting "Place."
- Or you can copy and paste one or two of the suggestions.

Slide 44

Suggestions can be modified once placed in the appraisal.

Slide 45

Job Coach

- The Job Coach provides hints and tips that apply to the specific job categories.
- Select the job Coach icon.

Slide 46

Job Coach

- Choose a job category from the list.

Slide 47

- Several job skills or types of knowledge are listed for the selected job category.
- Scroll the Advice Window to examine the hints and tips that apply.
- Click "Place" to add to the appraisal.

Slide 48

Additional Performance Standards

- Additional Performance Standards can be added to the appraisal.
- Scroll down in the appraisal document to "Additional Performance Standards".
- Place cursor where you want the standard to be added.

Slide 49

- Select "Insert" on the top command line, then select "Topic".
- Scroll through the list of available topics.
- Highlight the desired topic.
- Click "Ok"

Slide 50

- The selected topic is then added to the appraisal.
- Add information from the Writing Assistant or enter original text.

Slide 51
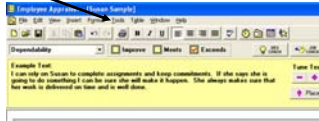
Performance Summary

- "Summary" is another topic available in the Writing Assistant.
- Using the Writing Assistant, the summary text can be tuned up or down and placed in the appraisal.

Slide 52
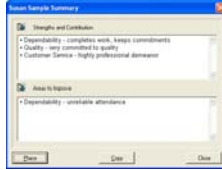
Generate Summary

- Based on your selections from the Writing Assistant, the Employee Appraiser is able to generate a summary of strengths and areas to improve.
- Select "Tools", "Generate Summary".

Slide 53

- The strengths and areas to improve upon can be added to the appraisal summary by selecting "Place".

Slide 54

Manager's Resource Center

Within the Manager's Resource Center is an assortment of tools that can help you manage your people and resources more effectively.

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Manager's Resource Center

Resource assistance is available for:

- Job Profiles (generic)
- Performance Objectives
- Employee Recognition (Individual & Team)
- Sample Coaching memos
- Development Plans
- And Corrective Actions.

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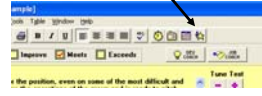Slide 56

Spell Check & Language Scan

- The Employee Appraiser allows you to check your spelling as well as scan your document for any potentially troublesome or inappropriate language.

- You can add your own terms to the language scan glossary used to conduct this scanning feature.

- Select "Tools" and then "Spelling" or "Language Scan"

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Slide 57

Employee Appraiser Help

The Appraiser program has a very robust help section:

- Help on specific tools.

- Step by step instructions.

- Tips for providing feedback.

- And More!

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Slide 58

Saving An Appraisal

- Select the correct directory and folder where the appraisal should be saved. (Check with your agency HR or IT staff.)
- Give the appraisal a name you will recognize, e.g. Susan Smith 4-06.

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Slide 59

Agency Resources

- Your agency Human Resource staff is an excellent resource for completing an appraisal and conducting reviews.

- Don't forget that proper feedback and evaluation is a year-long process of development, coaching, and mentoring.

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Let's help our employees reach new heights of performance!

Idaho Division of Human Resources 2006

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